



CHEMONICS INTERNATIONAL INC.

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**'Institutionalizing Excellence' at Excellence, Inc:  
The Good, the Bad, and the (Sometimes Ugly)  
Challenges**

Final Report  
March 2005

The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

## **Data Page**

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## **Abbreviations and Acronyms**

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AMIR	Achievement of Market-Friendly Initiatives and Results Program
BOD	Board of Directors
CCD	Company Controllers Directorate
CEO	Chief Executive Officer
COE	Centers of Excellence
EXI	Excellence, Inc.
GAM	Greater Amman Municipality
IT	Information technology
KAAGPT	King Abdullah Award for Government Performance and Transparency
MIT	Ministry of Industry and Trade
MoICT	Ministry of Information and Communications Technology
MoPIC	Ministry of Planning and International Cooperation
NAFES	National Fund for Enterprise Support
OPMGR	Operations Manager
SMART	Specific, measurable, attainable, realistic, and tangible (goals)
WAJ	Water Authority of Jordan

## **Abstract**

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This report presents an overview of Andrew Kaiser’s support for Excellence, Inc. (EXI). It details activities undertaken to support EXI to achieve fully sustainable operations and provide institution-building services to Jordanian institutions without the need for additional donor support.

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## **Executive Summary**

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This report provides an update on the status of Excellence, Inc. Topics covered include (1) a background of the consultancy, (2) status of Excellence, Inc.'s (EXI) current performance, (3) accomplishments and shortcomings against business plan objectives and timelines, (4) operational issues (5) recommendation for EXI as it moves forward, and (6) areas for AMIR-EXI collaboration.

The following are a synopsis of each section of this report:

### *Consultancy Background:*

This consultancy took place over thirty days between February and March, 2005. The focus of the consultancy was to support Excellence, Inc., a Jordanian not-for profit organization, to achieve excellence and full sustainability in its operations.

### *EXI Performance Status:*

Excellence, Inc. is up and running, has won seven institutional transformation clients, and is doing a capable job servicing these clients. However, EXI operations are as yet insufficient for the organization to grow and service a growing number of clients effectively. Improving EXI operations is imperative.

### *Grant Requirement Accomplishments and Shortcomings*

EXI's two most important grant requirements are its number of institutional transformation clients and amount of booked revenue. EXI has fallen four clients behind against its targeted number of institutional transformation clients. However, EXI has booked more revenue per client, making up most of the difference. EXI's booked revenue is 62,950 JD. EXI's target for the end of February was 66,897 JD, leaving EXI just slightly behind targets.

### *Operational Issues*

EXI employees identified and made commitment to improving several operational issues, detailed in this section. Most issues center around EXI's need to transform itself into a model organization worthy of emulation by EXI clients.

### *Recommendations for EXI*

The consultant recommends four focal areas for EXI improvement. They are (1) Tackle operational issues (identified in section IV), (2) improve teamwork, (3) utilize the AMIR Program as a resource, and (4) take a more studied, proactive marketing approach

### *Areas for USAID/AMIR-EXI Collaboration*

Several opportunities exist for greater USAID/AMIR-EXI collaboration. Greater involvement by the AMIR Program's Private Sector Policy Initiative's component leader is perhaps the most vital.

## **I. Background of the Consultancy**

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In September of 2004 the AMIR Program concluded its Centers of Excellence (COE) Program. COE's vision was to create a culture of government excellence in Jordan, with numerous institutions, individuals, and groups propelling themselves to set and surpass the international standard for best practice in their governing functions. The program worked with eight economic-oriented partner institutions to facilitate their transformation into certified Centers of Excellence, and to create, support, and institutionalize activities and incentives to inspire a culture of and an enabling environment for government excellence.

From the onset of implementation, the COE program sought to weave COE efforts into the fabric of Jordan's overall strategy for improving the public sector and especially the performance of its public institutions. Initially, this entailed working closely with the King Abdullah Award for Government Performance and Transparency, ensuring that government agencies had one criteria for excellence. The KAAGPT continues to serve, as a powerful motivator for government agencies to embark on ambitious institutional reforms. In some instances, this bolstered the effectiveness of COE Program efforts.

In July 2003, the COE Program initiated an internal effort to turn itself into a Center of Excellence through undergoing a comprehensive strategic planning effort. In addition to its mission statement and strategic objectives, the Program espoused the following new vision statement: *"Cease to exist as an AMIR initiative in 2004, having brought about exponential success in government performance. Transfer the concept and know-how to a local entity that assumes COE responsibilities"*.

The need to expand to meet the needs of other Jordanian institutions and to provide a viable alternative to the exiting COE Program became clear. Several Jordanian government institutions (not currently in the COE program) expressed an interest in benefiting from COE Program support. Many expressed a willingness to pay for this support with their own funds.

As a result, staff initiated plans for the program's exit strategy through a USAID grant. The grant provided start-up funding for a non-governmental organization (NGO) that carry on with the COE concept. The grant was authorized in March 2004 and Excellence, Inc., a Jordanian not-for-profit institution, came into existence. Excellence Inc., now operating: (i) provides AMIR COE Program services to an expanded number of Jordanian government clients; (ii) operates as a primarily private sector driven public-private partnership for sectors outside of government; and (iv) serves as a viable entity to which the COE Program can transfer service provision before ceasing to exist.

An initially planned overlap of COE management with the Excellence Inc. team did not occur due to the delayed launch of Excellence Inc. Because of this, a limited number of consulting assignments were planned so that the COE Program Manager could guide Excellence, Inc. through its initial efforts to become a self-sustaining institution.

This report gives an overview of the third such assignment, which took place over thirty days in February-March of 2005, as EXI entered its sixth month of operations. The consultant worked directly with EXI staff at their offices for the duration of the assignment.



## **II. Status of EXI's Current Performance: The Good, the Bad, and the (Sometimes Ugly) Challenges Ahead**

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### **A. The Good**

- EXI is up and running. EXI's Shmeisani office is impressive and appropriate for carrying out its daily activities. Recent purchases such as an interactive video-board make an impression on current and prospective clients.
- EXI has seven clients:
  - Ministry of Planning and International Cooperation (MOPIC)
  - Water Authority of Jordan (WAJ)
  - Ministry of Information and Communications Technology (MoICT)
  - Ministry of Industry and Trade (MIT)
  - Greater Amman Municipality (GAM)
  - Company Controllers Directorate (CCD)
  - The Department of Land and Surveys

This consultant feels that EXI services these clients well. Clients are (not surprisingly) keenly interested in doing well on the King Abdullah Award for Government, sometimes to a fault.

- EXI's technical specialists are out and about visiting and servicing clients roughly half of their time. Simply put, they are in demand. Demand is spiking dramatically as client organizations spend more and more time seeking to launch internal reforms in response to the King Abdullah Award for Government.
- Excellence Inc. employees, by and large, are enthusiastic about the jobs they do, the organization they work for, and the prospects of EXI as a whole. This is a dramatic turnaround from this consultant's last visit in December 2004, when the majority of the staff felt demoralized and cynical. One employee has left EXI.
- EXI has learned valuable lessons about the Centers of Excellence (COE) product, and have adapted COE services to fit the needs of paying clientele. Changes were all based on strategic decisions to enhance the appeal of COE clients. All seem to be good decisions.

Changes to the approach include:

- a. Shortening of the benchmarking assessment process by getting all of the decision makers to go through the criteria as a group
- b. Providing more individualized attention to each COE team (demanded by clients)
- c. Reducing the service timeframe to six months (for the same 10,000 JD fee) in order to maintain client commitment over the consultancy, while creating the possibility for more revenue.

## **B. The Bad**

- EXI's internal operations are severely lacking. Excellence, Inc. has created the essential elements of an internal framework for institutional excellence. Operating procedures, reports, and deliverables are clearly stated with accompanying deadlines. (Much of this is attributable to efforts of the Operations Manager (OPMGR).) However, EXI staff largely neglect to fulfill their operational commitments. Enforcement mechanisms are largely non-existent.

For an organization that supports institutional excellence, this finding is alarming. EXI is still new and has a lot to learn. Their strong client focus is worthy of praise but is not enough. Strong, institutionalized operational procedures that are adhered to by all staff are an immediate imperative. Section IV provides a list of EXI institutional shortcomings, potential consequences, and recommended solutions.

- EXI is neglecting their most important client: USAID/AMIR. While EXI has come very close to meeting stated grant milestones, EXI has not met its implicit obligations to the AMIR Program, and by extension USAID. Reports submitted to AMIR are inadequate. Individual consultant reports are overdue and have not been made a priority.
- EXI's relationship with the King Abdullah Award for Government Performance and Transparency (KAAGPT) is not yet solid. EXI's proposal to provide support to KAAGPT, on a fee-for-service basis, has not yet been accepted by the award—which viewed the offer as overly expensive. EXI is actively working to resolve this issue.

## **C. The (Sometimes Ugly) Challenges**

The following are challenges facing EXI:

- Establishing EXI's operational systems and procedures so that EXI can serve as a true example to its clients. This is an imperative that should receive immediate attention.
- EXI does not yet have enough clients. EXI has revised its approach so that it needs to service fewer clients in order to achieve full financial and operational independence and sustainability. This is fine, and EXI is learning a lot as it services its first batch of clients. Ultimately, however, EXI will need to learn to handle an increased client load.
- The need to rapidly achieve fully sustainable operations. There are four primary options for achieving full financial sustainability:
  - i. Win more COE clients.
  - ii. Charge more per client.
  - iii. Expand service offerings.
  - iv. Expand regionally.

This consultant feels that the above is the order that EXI should pursue. Expanding the number of government COE clients, and expanding COE services to the private sector, should be EXI's primary focus. Winning more COE clients would solidify EXI's capacity in this core service, while best serving EXI's mandate of building strong Jordanian institutions. One avenue that COE may consider in this capacity is

packaging and selling COE services in bulk to donor agencies wishing to support targeted sectors.

Charging more per client is an ideal solution. This will hinge on EXI's ability to build an extremely strong reputation. Critical to this is EXI's ability to gain strong reputation among initial clients.

Several additional service offerings are listed in EXI's business plan. EXI's ability to create these services, or others, in response to market demands is an ongoing challenge.

Regional expansion is the avenue that seems to be preferred among EXI's CEO and staff. While regional expansion would provide a means to underwrite services in Jordan by servicing more lucrative markets in the region, it is this consultant's opinion that EXI should first concentrate on solidifying its operations and client-base in Jordan before venturing into markets outside of Jordan.

- Finding the ideal mix of staff members and responsibilities. As a new organization, EXI staff members have undergone a steep learning curve. Staff transition is natural. One technical specialist has left EXI to pursue other opportunities. Another did not function ideally in a marketing and sales capacity, but has excelled as a technical specialist. A further staff restructuring may be necessary to find optimal team roles and responsibilities.
- Find a way for CEO to focus more time on leading EXI and on building EXI's organizational capacity. To fill the gap for the departed specialist, he has taken on consulting responsibilities in the leadership criterion. This has limited the time he has been able to spend on leading EXI itself, and on creating a sound institution.
- Overcoming the 'cushion' that the AMIR/USAID start-up grant has provided. With any organization receiving grant funding, it is a challenge to create the urgency that stems from raw entrepreneurship. EXI will increasingly need to make difficult decisions based on the need to rapidly establish its financial independence and autonomy.

### III. Grant Objectives and Business Plan Accomplishments

#### A. Grant Requirements

*Grant Requirement A:* Board of Directors identified and appointed. CEO and technical staff hired.

Outcome: Complete. This requirement has been met.

*Grant Requirement B:* NGO offices secured, set up, and furnished.

Outcome: Complete. This requirement has been met. EXI moved into its new, fully set up offices in January 2005.

*Grant Requirement C:* Number of Institutional Transformation (COE) clients:

Month	Grant Target Requirement	EXI Actual
December 2004	2	5
January 2005	4	1
February 2005	5	1

Outcome: EXI has fallen four clients behind against these targets. However, EXI has booked more revenue per client, making up most of the difference.

*Grant Requirement D:* New product development for prospective private sector, business association, and non-governmental clients.

Outcome: Incomplete. EXI has begun revisions to the COE methodology in order to adapt it to the needs of different sectors. While they have not yet done so, they have committed to conducting a 360 Analysis of the Business association criteria created by AMIR consultants. This is to be a focus in the following quarter.

*Grant Requirement E:* (Meet) Revenue targets (in JD) (booked revenue accounting)

Month	Grant Target Requirement	EXI Actual
October (2004)	0	0
November	0	19,800
December	17,417	29,700
January (2005)	31,667	7,000
February	17,813	6,450

Currently, EXI's booked revenue is 62,950 JD. EXI's target for the end of February was 66,897 JD, leaving EXI just slightly behind targets. *EXI risks falling further behind against these targets in subsequent months.* Booked revenue

projections for March (JD 25,333) and April (JD 11,875) will not likely be met unless EXI increases its current marketing and new business efforts. However, following April (month seven of the grant), EXI booked revenue projections fall to zero for the subsequent three months. Although EXI is falling slightly behind on revenue targets, these three months should give them ample opportunity to get back on track.

## **B. EXI Business Plan**

The goals the AMIR Program outlined in the business plan for the establishment of Excellence, Inc. have all been met. AMIR Program Director once stated that EXI would ‘test the market’ for institutional reform support services in Jordan. EXI is now actively testing this market. The business plan listed the following seven risks to EXI success. Following each risk, *in italics*, is a current assessment.

Risk I: Inability to find qualified leadership, technical personnel  
Risk level: low

Precautions: competitive salaries, comprehensive recruiting efforts in Jordan and the Gulf countries

*Result to date: Remains low. EXI’s leadership is capable. EXI technical personnel, for the most part, are sufficiently growing into their roles.*

Risk II: Inability to maintain explicit and implicit independence of the NGO  
Risk level: medium

Precautions: four rotating Board of Director (BOD) positions, strict by-laws governing independence, regular assessment of client’s perception regarding organization’s perceived independence and effectiveness; AMIR Program support

*Result to date: The risk of EXI losing its independence is low. EXI is firmly established as an independent organization. However, greater board involvement would benefit EXI.*

Risk III: Insufficient private sector understanding of EXI’s purpose  
Risk level: medium

Precautions: active engagement, high level organizational support, active participation of the BOD in soliciting private sector involvement, publication of successes; demonstration services

*Result to date: remains medium. This risk has yet to be tested as EXI has not yet actively pursued private sector clients.*

Risk IV: Inability to rapidly develop sufficient client base and financial sustainability  
Risk level: medium

Precautions: solicit financial support from MoAD to initial services to government agencies (or link services provision to KAAGPT participation) Carry out initial benchmarking assessments, strategic planning facilitation; Utilize BOD to solicit private sector commitments; tie benefits to ongoing support; achieve, publicize private sector friendly results

*Result to date: remains medium. EXI has gotten off to a solid start with a portfolio of seven clients. EXI's success or lack thereof hinges largely on the ability to win and manage a growing number of clients simultaneously.*

Risk V: Potential abuse of EXI's advocacy services through rent seeking and/or undue special interest policy manipulation

Risk level: low

Precautions: BOD review of service requests/provision; legally codified BOD structure that supports best-practice BOD operating procedures

*Result to date: remains low. Advocacy services have not yet become a sufficient part of EXI's business for this risk to have materialized. This risk has thus yet to be tested.*

Risk VI: Lackluster participation of government agencies

Risk level: Low-medium

Precautions: secure high level support for EXI (i.e. His Majesty King Abdullah II announcing launch) maintain connection to KAAGPT (i.e. criteria revisions); regular dialogue between BOD and award management

*Result to date: This risk no longer exists. EXI's existing clients are extremely engaged and are very actively working towards institutional reforms. This is due almost exclusively to their participation in the KAAGPT.*

Risk VII: Failure of KAAGPT, other excellence awards

Risk level: low

Precautions: pro-bono support to establish criteria for future awards, support assessors as needed

*Result to date: This risk has risen to medium. The KAAGPT remains in place and all indications are that it will continue. However, it appears to face serious threats to its legitimacy. The internal government debate as to where it should be housed continues. Resources for implementing the award appear limited. High level support for the award exists, but this support does not appear completely solid. The risks here are twofold: (1) that the award does not receive sufficient continuing, top-level support and resources, and (2) that the award loses legitimacy among government agencies vying for it due to inconsistent or inadequate award assessments and rankings.*

#### **IV. EXI Operational Issues**

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Excellence, Inc. is increasingly becoming a fully self-sustaining institution. There are areas, however, where AMIR Program support could hasten this process. The majority of opportunities for AMIR-EXI collaboration are in the area of operations. The matrix on the following pages presents pressing EXI operational issues, potential consequences, and actions that EXI employees have themselves proposed (excepting the final item) to resolve these issues.

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Operations Issue	Consequences	Proposed Solution
Electronic filing system not being used.	<ul style="list-style-type: none"> <li>▪ Institutional knowledge not captured, especially when employees leave.</li> <li>▪ Reduced knowledge sharing capabilities.</li> </ul>	<ul style="list-style-type: none"> <li>▪ OPMGR to send email reminder.</li> <li>▪ Each staff member should send email when they have completed this task.</li> <li>▪ Knowledge Management part of employee reviews and consequences attached.</li> </ul>
Weekly progress report not completed by most of team.	<ul style="list-style-type: none"> <li>▪ CEO doesn't know how time is being allocated to various projects and clients.</li> <li>▪ CEO can't lead and direct staff.</li> <li>▪ Unable to identify roadblocks, missed deadlines, etc.</li> <li>▪ Jeopardize relationship with AMIR because Greta has asked for this repeatedly.</li> </ul>	<ul style="list-style-type: none"> <li>▪ OPMGR sends email with new process and guidelines for reports.</li> <li>▪ Office Manager (OM) to send reminder on Wednesdays.</li> <li>▪ Reports to be sent to OPMGR and OM; OM collects and sends all to PSPI Team Leader in one email.</li> <li>▪ OPMGR provides feedback and sends to CEO; CEO provides feedback to team.</li> </ul>
Performance appraisals have not been conducted.	<ul style="list-style-type: none"> <li>▪ Team does not know their areas for improvement; they have no incentive to improve.</li> <li>▪ No performance standards and accountability.</li> </ul>	<ul style="list-style-type: none"> <li>▪ CEO sets date for 6-month review.</li> <li>▪ CEO reviews appraisal form.</li> <li>▪ OPMGR sends and collects self-appraisals.</li> <li>▪ CEO completes review form and conducts individual meetings.</li> </ul>
Team does not keep calendar up to date.	<ul style="list-style-type: none"> <li>▪ Difficult to schedule meetings and coordinate.</li> <li>▪ Cannot notify callers where people are and when they will return.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Install exchange server.</li> <li>▪ OM manages CEO calendar.</li> <li>▪ Propose to the group to use Outlook calendar and scheduling and gain consensus.</li> <li>▪ Provide training if needed.</li> </ul>
No weekly team meeting.	<ul style="list-style-type: none"> <li>▪ Lack of coordination and attention to operations issues.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Schedule weekly meeting.</li> <li>▪ OM keeps the agenda.</li> <li>▪ PSPI Team Leader attends bi-monthly meeting.</li> <li>▪ Include monthly financial update.</li> </ul>
Performance monitoring database not completed. M&E system not implemented – no data gathering, entry, analysis.	<ul style="list-style-type: none"> <li>▪ Team does not know whether they are meeting strategic objectives and target indicators.</li> <li>▪ Cannot identify areas for improvement.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Set deadline with accountant or outsource.</li> <li>▪ Train OM to collect and enter data.</li> </ul>
Training registration database.	<ul style="list-style-type: none"> <li>▪ Do not have a central database to record training attendees and training evaluations.</li> <li>▪ Cannot assess impact of trainings.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Discuss cost-benefit with CEO.</li> </ul>
No contact database.	<ul style="list-style-type: none"> <li>▪ Cannot send email announcements and advertisements.</li> <li>▪ Cannot easily locate contacts of other team members.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Install exchange server.</li> <li>▪ Collect contact lists.</li> <li>▪ Purchase business card scanner.</li> <li>▪ Create contact database.</li> <li>▪ Obtain AMIR database.</li> <li>▪ Hire data entry person to clean it up.</li> </ul>



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Accounting system and financial reports. EXI needs them to assess sustainability.	<ul style="list-style-type: none"> <li>Cannot allocate expenses to various clients and projects to aid in decision-making</li> <li>Cannot evaluate sustainability.</li> <li>Cannot complete liquidation reports without errors.</li> <li>Cannot give reports to Board of Directors for oversight.</li> </ul>	<ul style="list-style-type: none"> <li>Accountant to work with AMIR staff.</li> <li>Consultant to train accountant.</li> <li>Need contract with this consultant.</li> </ul>
Nothing is being done on NAFES/SME marketing.	<ul style="list-style-type: none"> <li>Pool of money is sitting there without access.</li> <li>May lose the opportunity.</li> <li>Probably will not meet milestones without this funding.</li> </ul>	<ul style="list-style-type: none"> <li>Hire short-term marketing/sales specialist</li> <li>Select target sector.</li> <li>Adapt product to SME sector.</li> </ul>
Events reporting to AMIR is not happening.	<ul style="list-style-type: none"> <li>Not meeting grant reporting requirements.</li> </ul>	<ul style="list-style-type: none"> <li>Template email and do one example with OM.</li> <li>Copy OPMGR going forward.</li> </ul>
Lack of internal communications plan.	<ul style="list-style-type: none"> <li>Staff does not know what is taking place in the office.</li> <li>Staff does not know big picture of clients if they are not the project manager.</li> <li>Less transfer of knowledge.</li> </ul>	<ul style="list-style-type: none"> <li>OM should coordinate general office communications, such as holidays, trainings, etc.</li> </ul>
CEO too involved in day-to-day implementation.	<ul style="list-style-type: none"> <li>Leadership/direction suffers.</li> <li>No time to support and enforce operations objectives.</li> </ul>	<ul style="list-style-type: none"> <li>Train OM as executive assistant, could sit with PSPI Program Assistant one day.</li> <li>Set limit on time spent at clients.</li> <li>Hire additional staff member or consultant to replace staff responsible for leadership criterion.</li> </ul>
Lack of focus on the conference.	<ul style="list-style-type: none"> <li>Conference will not be well planned and executed.</li> <li>Conference will not achieve its goals.</li> </ul>	<ul style="list-style-type: none"> <li>Postpone conference until September: tool to win clients after KAA.</li> </ul>
Lack of sufficient business development resources.	<ul style="list-style-type: none"> <li>A very limited client backlog currently exists. EXI may need to start from scratch after this project cycle is complete.</li> </ul>	<ul style="list-style-type: none"> <li>Speak with AMIR Program's Team Leader of Enhanced Competitiveness Initiative about possibilities for EXI to service Vision 2020 business clusters, find funding to do so.</li> </ul>

## **V. Primary Recommendations for EXI**

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**This section presents those areas where this consultant believes EXI should focus its efforts in order to improve the overall performance of the organization.**

### **A. Improve Operations**

The primary ingredients missing from strong operations are adequate incentives and leadership reinforcement. Staff members need to fully understand the importance of building up EXI as a strong institution. If they are unable or unwilling to fulfill their obligations, or to support each other as a team to achieve operational excellence, then they are probably not the right fit for the long-term. Support staff need to play an increased roll in coordinating technical specialists and ensuring that operations run smoothly. Specific operational needs are identified in Section IV of this report.

### **B. Increase Teamwork**

EXI's technical specialist and staff are growing into their roles, and by-and-large coming into their own individually. While individuals are supporting each other on an as-needed basis, more could and should be done to create an environment of teamwork. This is fundamental in ensuring the that lessons are being captured and learned internally, and that EXI staff are able to deliver consistent services of ever increasing quality to clients.

### **C. Utilize the AMIR Program as a Resource**

EXI could benefit greatly by using The AMIR Program as a greater resource. The AMIR Program appears to be viewed largely as an oversight organization, rather than as a valuable resource, by EXI. This needs to change. There are numerous opportunities where AMIR staff can and should provide valuable support and guidance to EXI. Specific recommendations of areas for AMIR-EXI collaboration are listed where relevant in Section IV.

### **D. Create and Carry out a Marketing Strategy for Client/Sector Expansion**

The marketing plan as outlined in EXI's business plan is becoming obsolete due to changing circumstances. Insufficient incentives for business associations to purchase EXI COE services, have, for the moment, delayed entry into this market. EXI has received an offer from the (Japanese funded) National Fund for Enterprise Support (NAFES) to subsidize EXI's COE support for a group of small businesses clients of EXI's choosing. This 30,000 JD will be used to subsidize EXI's entry into a new market segment. Ideally, EXI would have small-business clients lined up to begin receiving EXI COE support immediately following the submission of KAAGPT applications, as EXI's government clients will likely become less demanding of EXI staff time once they have done so. New clients should be in place to ensure continued revenue flows.

EXI's marketing strategy should be developed internally—perhaps using local marketing professional for support—and should be built around anticipated time-frames of prospective target sectors. EXI is considering bringing in a short-term marketing person to

assist EXI's efforts in identifying target small business clients and selling EXI services. This is a good idea, and should the short-term arrangement work out this person could continue marketing EXI services to other clients and sectors.

Where possible, marketing cycles should be structured around existing incentives for institutions to achieve Excellence. For example, EXI can expect heightened demand amongst government agencies approximately six months prior to the King Abdullah Awards for government. Careful marketing could also create demand among government institutions directly following the KAAGPT award. Target clients would include those organizations wishing to get a 'head-start' and really prepare well for the subsequent KAAGPT, and those government agencies newly named to participate in the following award cycles. The King Abdullah Award for Private Sector Institutions presents a similar opportunity. Ideally, the timeline for this award would complement that of the KAAGPT.

## **VI. Suggestions for Greater USAID/AMIR-EXI Collaboration**

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This section contains recommendations on how the AMIR Program could support EXI in its efforts to become a sustainable organization that embodies international best-practices.

### **A. Accounting Training, Support**

EXI accountant is an exceptional and hard-working employee. His strength, however, lies in information technology (IT) and not in accounting. EXI has just contracted a consultant to get their accounts up and running in Quickbooks. This is very important for numerous reasons, most importantly resource planning and grant monitoring. It may be beneficial to have this consultant update the books—or to support the accountant’s work in upgrading the books on a monthly basis. Another option is to have AMIR financial/accounting staff work with EXI accountant on a monthly basis until he is completely comfortable handling accounting and financial management issues as well as IT issues.

### **B. Administrative Assistance Training**

The Office Manager, likewise, does a good job with basic administrative work. EXI could use a multi-purpose administrative assistant/office manager along the lines of some of AMIR’s exceptional staff, i.e. PSPI Program Assistant. EXI would benefit greatly from the OM growing into this position as much as possible—given her professional experiences and capabilities. Expanded duties for the OM could include setting up group meetings, requesting and compiling regular deliverables of EXI staff (such as weekly reports), and generally backstopping of the CEO and technical specialists. To support her in this role, PSPI Program Assistant has agreed to put together and lead a training plan for EXI/OM. This will involve team management, administrative backstopping, group scheduling, etc. It will also include training from AMIR’s training department as the OM coordinates most EXI training events.

### **C. Bi-Weekly Operational Meetings with PSPI Team Leader Attendance**

EXI has recently committed to holding regular weekly team meetings. Meetings will primarily serve as a round table for technical specialists to discuss the clients they manage and for the team to share tools, approaches, ideas, and experiences—while agreeing on how to best service clients.

Every second week an operational component will be added to the regular meeting, where an hour is set aside specifically for dealing with operational and business development initiatives, along with special topics. These meetings will be conducted in English, and EXI will also invite AMIR PSPI Team Leader to attend. This will serve the dual purpose of keeping the AMIR Program better informed, while creating a structured means for ongoing advice and involvement.

### **D. Packaging Proposals**

Moving forward, EXI marketing efforts will include packaging proposals to various donor agencies and business sectors operating in Jordan. Select donors may be asked to subsidize

EXI's expansion of its service offerings into different sectors. This will provide EXI a means to gain a group of same-sector institutional clients at one time. As proposal writing and presentation is not a core competency of EXI's, and English writing skills vary among EXI staff, EXI would benefit from AMIR proposal writing and editing guidance from AMIR's communications department. This support will become necessary as EXI begins identifying these opportunities and pitching them to donors, and submitting formal proposals. Additionally, the AMIR Program could support EXI to approach select sectors, i.e. those creating sector-strategies in support of Jordan's Vision 20/20. EXI should discuss this possibility with the Team Leader of the AMIR Program's Enhanced Competitiveness Initiative.

#### **E. Running Trainings and Events Using AMIR Program Tools and Technical Support**

EXI already carries out numerous training events. The administration of these events is largely handled by the OM. The AMIR Program is known for its excellence in managing training events. While EXI trainings have been very professional to date, the OM would benefit from a better understanding of how AMIR Training Department carries out trainings, so that she can adapt lessons learned for EXI. This linkage is being worked into the training plan for the OM being prepared by the PSPI Program Assistant.

#### **F. Leadership Coach for CEO**

EXI CEO is exceptionally driven and hard working. He is determined to make EXI succeed and is a credit to the organization. There are some areas where he could better serve EXI by modifying his leadership style. Leadership coaching is a tool that would help the CEO to fulfill his full potential in this area. Coaching sessions would ideally be structured, regular, and held at least monthly. Perhaps the head of the Board of Directors, AMIR Program Director, or PSPI Team Leader could support the CEO in this capacity.

#### **G. Monitoring and Evaluation Support**

EXI has comprehensive organizational and personal work plans with specific, measurable, attainable, realistic, and tangible (SMART) goals. Thus far, these tools have not been sufficiently used to regularly monitor deliverables against EXI's stated objectives and goals. Without effective monitoring and evaluation (M&E), these plans are useless as a tool to make decisions and focus priorities. EXI's operations manager has committed to reviewing deliverable timeliness with each technical specialist monthly and to report findings to EXI's CEO—along with recommendations. Once-a-month, in-person support from AMIR Program M&E specialist would provide EXI's Operations Manager with a better understanding of how to carry out M&E, while also providing a fixed timeline and schedule for EXI staff to reflect upon their progress towards target outputs and strategic objectives.